

How to Create Your Own Documentation Standards

Documentation standards are the surest, most efficient way to develop accurate, credible and professional documents that people use and trust. This document offers guidelines for developing such standards for your organization.

Most organizations produce a great deal of information that appears in documented, or written, form: the larger and more diverse the organization, the greater the volume and diversity of its documentation. Documentation can be as routine as a memo or slide presentation or the outcome of a significant, long-term project. In any event, documentation standards help ensure that an organization's documentation is accurate, clear and professional.

What are Documentation Standards?

Documentation standards are rules and guidelines for creating, formatting, revising and distributing information and communication on behalf of an organization. Documentation standards address the following topics:

- Document creation, file naming, saving and sharing
- Writing, language usage and style
- Organization-specific content and style
- Design, format and production guidelines
- Accessibility for users of differing abilities
- Quality assurance and accuracy
- Document lifecycle: development, approval, distribution, review and revision

Documentation standards establish consistency across all documents, regardless of content. Consistency, both verbally and visually, is a hallmark of professional communication and one of the surest routes to establishing a strong brand identity.

Why Are Documentation Standards Important?

Documented information and communication often represent the organization to others and may be a matter of public record. Equally important, documentation is the chief means of formal communication within the organization. In either instance, documentation may contain vital information and instruction with profound and far-reaching consequences.

Therefore, developing common standards is a critical operating strategy. Apart from our ability to speak and write standard English, documentation standards are the foundation of professional, trustworthy communication.

Finally, documentation standards guide all aspects of product development so that staff produce consistently high-quality documents as efficiently as possible.

Review the Texas Division of Emergency Management (TDEM) *Documentation Standards for Preparedness Plans Units* for a comprehensive example.

Who Benefits From Documentation Standards?

Those who read and use TDEM's Preparedness plans documentation benefit from the fact that these documents have been prepared according to professional standards. Documents are clear and user-friendly, appealing to a wide range of users including planning partners in other agencies and organizations, emergency managers, and community stakeholders. In addition, planners benefit from documentation standards as they develop plan documents. This is because these standards provide important, consistent guidance on most matters of verbal and visual expression, production, and quality assurance.

Developing Your Documentation Standards

Your first step is to decide what your organization's documentation-standards needs are. When doing this, always remember the larger goal. It is not to create pretty documents. The goal is to create documents that are read, relied on and trusted by your audience. You do this by meeting their information and documentation needs.

Use the following guidelines and tips to help you develop your documentation standards. Have a copy of TDEM Preparedness' *Documentation Standards for Preparedness Plans Units* on hand, so you can refer to it for examples.

Document Creation and File Management

Before establishing standards for opening and naming document files, check with your IT subject matter expert for existing guidelines.

Determine how and where files are edited, saved, backed up and stored. If documents are shared, create a process for identifying versions and rules for editing, tracking and accepting changes.

Consider including copyright and plagiarism information in this section for visibility, since most users refer to this section for file management information.¹

Develop a checklist, similar to that in TDEM's *Documentation Standards*, to help staff implement your documentation standards.

Writing and Language Style

Primarily, documentation writing and language standards help staff ensure that documentation is accurate, correctly written, and consistent.

Choosing a standard dictionary and style manual² are the first two steps to take in this direction.

¹ For more information on copyright, search the Internet using the search terms "copyright information." Several university libraries and some trade associations offer information on copyright protection and plagiarism.

Secondarily, documentation writing and language standards help staff members write clearly, simply and concisely.

Specifying a reading level, providing tips on drafting certain documents, discussing good and poor examples of relevant types of text increase staff awareness of good writing.

Review TDEM's Documentation Standards for topics that may be relevant to your organization's writing needs.

Specify a heading structure to help readers skim and find information quickly. Three levels of heads, similar to outline indentions, are sufficient for most information.

Include guidelines that address common questions or errors, especially those that are specific to your documents.

Consider including a glossary of specialized terms and examples of standard or "boilerplate" text, which are especially helpful to new staff members.

Consider developing standards for specific types of content. For example, memo guidelines include tips on organizing information clearly and persuasively for proposals.

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Design and Format An organization's image and brand is conveyed initially by the look and feel of the material it produces.

Documentation standards preserve brand identity by establishing a consistent, professional appearance.

Choose a typeface from among those that are easy to read, and keep font size no smaller than 9pt to meet readability guidelines. Verdana has been judged to be among the easiest fonts to read on screen. Here are five others:

- Arial
- Calibri
- Helvetica
- Tahoma
- Times New Roman

More information on accessible style appears in [Accessibility](#)

² For more information, refer to leading style manuals, such as *The Associated Press (AP) Stylebook* or *The Chicago Manual of Style*.

below. Review TDEM's Documentation Standards for topics relevant to your organization's design and format needs.

Use default settings of your word processing program, when possible, to determine specifications for key features:

- Page margins and orientation
- Page numbering and footers
- Color
- Text headings
- Lists, bullets, numbers
- Tables
- Image appearance

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Accessibility Section 508 of the 1998 amendment to the Rehabilitation Act of 1973 requires federal agencies make information that is distributed using electronic technology equally accessible to people with disabilities.³

As a state agency TDEM is not subject to this regulation. Nevertheless we develop documentation that complies with Section 508 when practical and recommend that other organizations do the same.

Adopt a typeface that is highly legible. Refer to *Design, Format and Production* section above.

If you use color, make sure the colors you choose contrast appropriately so that they can be read and differentiated by colorblind people. Avoid using color as the only variable that differentiates information.

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Quality Assurance (QA) The quality assurance process helps ensure that documentation standards are applied consistently and correctly. This process closes the loop that began with the

³ For more information on Section 508, refer to U.S. Department of Health and Human Services. *Section 508*. March 2014. <http://www.hhs.gov/web/508/index.html> (accessed April 8, 2014).

development of the standards themselves.

Although most organizations have limited resources to devote to this function, they can take steps to address quality and heighten staff awareness of its importance.

Develop quality assurance checklists, such as those in TDEM's Documentation Standards.

Consider providing a brief overview of copy editing and proofreading, including a source for proofreading marks.

Document Lifecycle

Outline general documentation maintenance and review procedures, so staff members know their roles and what to expect.

Maintenance and review guideline topics include the following:

- Developing revision files from existing current files
- Distributing files for review
- Collecting, synthesizing and incorporating review comments
- Approval processes
- Draft naming and watermark conventions
- Publication and distribution
- Other items specific to your organization

Front Matter and Back Matter

For longer documents, such as reports, plans or formal publications, choose a format and write instructions for developing the main elements of the front and back of the documentation.

Front-matter elements:

- Covers and titles pages
- Author names
- Copyright or permissions
- Table of contents
- Preface or introduction

Back-matter elements:

- Appendix
- Notes
- Glossary
- References or bibliography
- Index
- Attachments

Implementing and Maintaining Your Standards

Documentation standards remain useful only if they are treated as living data. As soon as they are first released, changes, corrections, updates are inevitable.

Keeping Them Current

Have one or two designated staff members collect and implement all changes. Communicate often about your documentation standards, reminding staff how to leverage available resources, such as dictionaries, style manuals and online fact-checking. Share any updates or changes on an ongoing basis.

How to Create Your Own Documentation Standards: A Checklist

Use this checklist to make sure you are developing useful and user-friendly documentation standards for your organization.

Complete	Task
<input type="checkbox"/>	Project stakeholders understand and support the project.
<input type="checkbox"/>	Resources are allocated appropriate to the project's scope.
<input type="checkbox"/>	Stakeholders communicate the importance of documentation standards.
<input type="checkbox"/>	Analyze documentation to determine document standards needs.
<input type="checkbox"/>	Develop standards for documentation and file management that include naming, sharing and tracking changes to files.
<input type="checkbox"/>	Provide summary information about copyright and plagiarism.
<input type="checkbox"/>	Develop standards for document front matter and back matter, including covers and title pages, tables of contents.
<input type="checkbox"/>	Choose a dictionary and style manual for reference.
<input type="checkbox"/>	Develop other language standards appropriate to the organization's needs.
<input type="checkbox"/>	Choose a highly legible typeface.
<input type="checkbox"/>	Provide guidelines on using images.
<input type="checkbox"/>	Ensure standards reflect accessibility guidelines for type font and color use.
<input type="checkbox"/>	Develop quality assurance (QA) checklists and other QA procedures that respond to the needs of your organization.
<input type="checkbox"/>	Describe how the documentation standards themselves are maintained, updated and updates distributed.
<input type="checkbox"/>	Describe the documentation lifecycle in your organization, including revisions, reviews and approvals, publication and distribution.

For More Information

For more information on this document contact Bill Wahlgren, Program Specialist, at bill.wahlgren@dps.texas.gov.

Please direct general questions to Kiran Dhanji, Section Administrator, at kiran.dhanji@dps.texas.gov.

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